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ABSTRACT

Common factors among high-performing distance learning (DL) programs were examined through case studies at 9 further education colleges and 2 nonsector organizations in the United Kingdom and a backup survey of a sample of 50 distance learners at 5 of the colleges. The study methodology incorporated numerous principles of process benchmarking. The study established that, in terms of planning, monitoring, and managing provision, good practice for DL has much in common with good practice for any program delivered through other modes of attendance. The data strongly suggested a correlation between meeting quality criteria in the planning, resourcing, and supporting of DL programs and the successful outcomes achieved by learners and the DL organization itself. The following factors were identified as critical success factors for DL: (1) integration of program planning, monitoring, management, and resources; (2) a good understanding of the DL operation's costs; (3) tutor and other contact with learners; (4) pre-entry guidance; (5) well-established procedures for selecting learning materials and monitoring their use; and (6) procedures to obtain customer feedback and a process to incorporate feedback survey results into future program planning. (The DL provider questionnaire and background summary are appended, along with the student questionnaire. Contains 19 references.) (MN)



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Going the distance

Are there common factors in high performing distance learning?

**Rosemary Hawksley
and Jane Owen**

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in high performing distance learning?**

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and Jane Owen**

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Contents

<i>Introduction</i>	5
<i>Summary of conclusions</i>	6
Planning	6
Management integration	6
Data	7
Costs	7
Tutor contact	7
Pre-entry guidance	8
Learning materials	8
Isolation of learners	8
Feedback	9
Other support for providers	9
<i>Methods</i>	14
<i>Findings of the project</i>	19
Diversity ... and its consequences	19
Looking for patterns	21
Planning, monitoring and management	23
Integration of processes	25
Finance	26
Pricing	28
Support for the learner	29
Initial information and guidance	33
Recruitment of staff	35
Learning materials	38

Premises and equipment	40
Customer satisfaction, including the learner survey	41
Retention and achievement	43
<i>Conclusions and recommendations</i>	47
Issues around definitions	47
The case for distance learning	49
Recommendations	51
<i>Appendix 1 Distance learning provider questionnaire and background summary</i>	56
Planning the service	56
Resources – finance	58
Resources – staffing	60
Resources – learning materials	61
Resources – equipment/premises	63
Delivery and support systems	64
Customer satisfaction	67
National report from the Inspectorate on Open and Distance Learning, FEFC, 2000–01	69
<i>Appendix 2 Student questionnaire</i>	71
<i>References, further reading and useful websites</i>	75
References	75
Further reading	75
Useful websites	76

Introduction

Distance learning's unique capability to meet the individual needs of a wide range of learners and thus to widen access to learning makes it an extremely important strand of provision in the new post-16 sector. Only quality distance learning can do this.

Employers need responsive training that meets the needs of individual employees or small groups, that is cost effective to provide and achieves the desired outcomes. High quality distance learning is a successful way to provide such training.

This report is the result of an investigation using case studies at nine colleges and two non-sector organisations and a back-up survey of a sample of students at five of the colleges.

Summary of conclusions

Good practice for distance learning has much in common with good practice for any programme delivered through other modes of attendance, in terms of planning, monitoring and managing the provision.

Planning

Our research strongly suggests that there is a correlation between meeting quality criteria in the planning, resourcing and supporting of distance learning programmes and the successful outcomes that the learners and the organisation themselves achieve. A number of providers had high retention rates for distance learning. These were sometimes but not always accompanied by high achievement rates. We believe this merits further investigation.

Management integration

Colleges often seem to find it difficult to integrate the management of distance learning programmes into the main college planning, funding and management cycles. However, there were college providers who had long-standing and successful distance learning operations integrated into their main college processes, showing that integration is possible. Providers who achieved high quality outcomes regarded planning, monitoring, managing and resourcing as related not separate processes, and they operated them in an integrated way. This seems to be a critical success factor for a distance learning service.

Data

We had hoped to gather data to allow us to suggest metric benchmarks for distance learning provision but our initial research showed that data is not currently gathered and processed separately for distance learning so we could not proceed on this. Later we experienced some colleges' difficulties in providing data on their distance learning provision and were glad we had not attempted to work on metric benchmarks at this stage. We recommend to the Learning and Skills Council (LSC) that it revises the method of collecting data to allow metric benchmarks to be set for distance learning as soon as possible.

Costs

Most college providers did not have a clear idea of the costs of their distance learning operation. The problem did not appear to us to be so much with funding as with planning – only those who planned well knew what distance learning cost them.

Tutor contact

Tutor and other contact with the learner is a critical success factor for distance learning. Tutor contact in itself does not ensure success – more subtle characteristics about the support emerged as crucial (eg speed of initial contact, close monitoring of students' progress etc). All providers recognised the importance of the tutor to their operation but there were marked differences between providers with successful outcomes and others in the rigour of selection and management procedures.

Pre-entry guidance

Pre-entry guidance is another vital component of successful distance learning provision. Only 46% of distance learners said they had received initial guidance on their choice of course but 91% of all those learners who had received guidance said it was helpful or very helpful.

Learning materials

Providers with the most successful outcomes had procedures not only for selecting learning materials but for monitoring their use and using the feedback in their management and review processes. The quality of learning materials used was variable. Of all learners, 67% said the materials used were effective or very effective and 33% said the materials used were not at all effective or only reasonably effective. Only 28% of learners had been shown examples of the learning materials that they were going to use. Where learners had been shown materials, 76% of them considered it to be helpful or very helpful

Isolation of learners

Most distance learners study almost entirely on their own. The contact with their tutor is usually by telephone or post. More than 90% of distance learners only 'occasionally' or 'never' use the facilities on offer to them such as computers or libraries, only 10% of them are in touch with other learners, and the majority of even that contact is only by telephone. The consequences of any poor practice are particularly exposed in distance learning programmes because the students cannot call on the social factors that can help to retain learners who are thinking of leaving an attendance-based course.

Feedback

All college providers had procedures in place to obtain customer feedback; all had a customer charter (often the college charter) and a complaints procedure. Providers with the most successful outcomes were distinguished from others in the use they made of the survey results, the feedback from learners or the record of complaints.

Other support for providers

There is at present a tension between the providers' wish to exploit the very varied potential range and design of distance learning courses to meet client need, and the funding bodies' legitimate need to frame a definition of 'distance learning' to ensure quality in publicly funded distance learning provision. We believe that this tension may inhibit the expansion of distance learning. We suggest that the LSC considers providing a simple minimum specification for distance learning programmes, or a series of such specifications, together with guidance on a costing method, a revision of the collection of data for distance learning to standardise and simplify it, and recommendations on good practice.

Background to the study

Open and distance learning are established methods. The best schemes have been very successful in meeting the needs of individual learners and in delivering high retention and achievement rates at a cost acceptable to the learner, or their employer, and to the providing organisation. However, the flexibility of time, pace and place of learning that the methods offer have also led to debate and confusion over the definitions of open and distance learning over many years.

In turn this confusion has led to loose practice over the use of definitions of open and distance learning. Research by the National Extension College (NEC) in 1998 into the definitions of open and distance learning used in the FE sector exposed widespread operational confusion over their classification. One curriculum director summed it up by saying:

Yes we do have definitions of open and distance learning but they mean different things to different people.

What one college defined as part-time provision might be classed by another as open learning. Others considered some provision to be open learning that the then FEFC definition would classify as distance learning. The situation was further complicated by the funding advantages that some colleges perceived were to be gained by defining provision one way rather than another, with consequent anomalies reflected in some individualised student record (ISR) data.

Also, some colleges, not necessarily those with prior experience as providers of open or distance learning, saw opportunities post incorporation either to offer open or distance learning themselves or to contract out parts or the whole of a distance learning operation. The poor

quality of much of this provision, as measured by retention and achievement rates, was highlighted in the FEFC national report from the Inspectorate on Open and Distance Learning (2000–01, referred to below as the FEFC report on ODL). Many providers of good quality distance learning, including the NEC, were concerned that the poor quality of some of this recent high-volume provision in a few specialist areas could damage the reputation of the method in the FE sector, and beyond.

This combination of factors has resulted in a dearth of robust data about open and distance learning provision in the FE sector. There would be considerable consensus among experienced practitioners, whether in a particular college, corporate or private provider, on the prerequisites for quality open or distance learning provision. In recent times, however, there has not been any widely available study to provide comparative data for a metric or process benchmarking exercise. The FEFC report on ODL concluded with the recommendation (para. 76) that 'The funding council should develop and publish benchmarks for distance learning...'.

The need for reliable comparable data has also become more urgent as providers everywhere consider and engage with the opportunities provided by e-learning. Quality standards for open or distance learning, the processes required to achieve those standards and the indicators needed to measure the success of the processes, are not likely to be identical for open and distance learning and e-learning, but all concerned recognise that the issues are often the same. Research into open and distance learning is relevant to the e-learning debate and vice versa.

The study was set up as an independent piece of research jointly funded and managed by the Learning and Skills Development Agency (LSDA) and the NEC.

The study's aim was to apply the complementary expertise of the LSDA and the NEC to the initial stage of work on research into open and distance learning in colleges. We decided to use the methods of process benchmarking whereby 'benchmarking is a systematic method of improvement that utilises others' good practice to improve your own processes' (Owen 1999). We wanted to identify areas where it appeared from the study that there were common factors that contributed to quality, as the basis for the development of metric and process benchmarks for open and distance learning.

Preliminary investigations in the FE sector quickly confirmed that, as the FEFC report on ODL had noted: 'Open learning is harder to define than distance learning'. Colleges had very variable practice in the classification of provision as 'open learning' and, as a result, in some cases, they had potentially large areas of open learning provision.

We judged that the potential scale and complexity of an investigation into open learning were beyond the capacity of this small study, although they clearly merited investigation, and we decided to restrict our research to distance learning. We adopted the definition of distance learning used in the FEFC *Guidance on further education funding eligibility and rates, 2001-2* (referred to below as *Funding guidance*) (para. 183) for distance learning programmes other than Ufi:

Those on which learners study with specially prepared learning materials for their private study and are provided with active learner support, by suitably qualified staff, to enable them to successfully achieve the outcome identified in their learning agreement. This definition is intended to cover situations in which study is essentially home or work based and there is only occasional contact with the institution.

The outcomes of the study were:

- identification of those aspects of the processes in distance learning provision that seem to enable good results to be achieved as the basis for **process benchmarks**, based on an analysis of quantitative and qualitative data
- the development of the **college questionnaire** as a research tool and as a 'self-check' tool to help the self-assessment reviews and action planning of providers offering distance learning
- the **sharing of good practice** found in the study.

Methods

Ten colleges in the FE sector were selected initially to be as representative a cross section as possible in terms of size, geographical location, scale of distance learning and experience of distance learning. We consulted the individualised student record (ISR) data and drew on the NEC's considerable knowledge of distance learning in the sector to make the selection. In the event, nine participated. We aimed to include a majority of colleges where the evidence suggested that distance learning was operating successfully. The validity of our selection was checked with the National Institute of Adult Continuing Education (NIACE) and with the former FEFC lead inspector on open and distance learning. The retention and achievement data of those on the list was also screened by the LSDA.

Desk research carried out in the initial stages of the project had highlighted some of the key issues that were likely to affect the provision of distance learning. These issues gave us useful guidance on the possible key areas within distance learning provision.

The project involved a number of researchers talking to some very different colleges and other organisations. We decided to produce questionnaires in order to ensure that the information we obtained from each was comparable (see Appendix 1). The questionnaires were sent to the organisations to give them advance notice of what information would be requested along with enough time to gather relevant documentation.

The questionnaire was produced using the same principles as those used in producing benchmarking questionnaires and followed the basic template below:

- What is the process?
- Is there a documented description or flowchart of the process?
- What process measurements do you use?
- What are the current measurement results?
- What aspects of the process work well?
- What are the problems you have with the process?
- What improvements have you made to the process?
- Is there any other information you feel might be helpful to us?

(Owen 1999)

It was tested with staff not involved in the project before use.

The questionnaire was then sent to each of the organisations taking part in the project in advance of the researcher's visit. Colleges provided a considerable amount of information to support the answers they gave to the questions.

To provide some comparison with the results from colleges and to take account of the new, wider post-16 sector, we also decided to include evidence from two non-college providers of distance learning. One was in the public service sector and the other was a commercial organisation. Both had been awarded the British Association for Open Learning (BAOL) Quality Mark for open and distance learning and were chosen with advice from BAOL that they were quality providers of distance rather than open learning.

Each organisation in the survey was visited by a project member, or in some cases two, for 1 day. They met with key staff, including those who had strategic and operational responsibility for distance learning.

We also wanted to validate colleges' views on the outcomes of their processes on their customers by questioning a sample of learners, to find out how well the service met their needs, what worked well and what did not work well. We were given permission to use, with small adaptations, the student questionnaire used by the FEFC Inspectorate. This (see Appendix 2) was sent to a representative group of five of the colleges in the survey to circulate to the first 50 distance learners on their current records. Replies were sent direct by the students to the LSDA for analysis. The response rate was an excellent 31%, allowing us to draw very useful conclusions to cross reference with the information from providers.

Finally, we used the information gathered from the provider visits and the learner survey to try to identify the critical success factors in the provision of distance learning. The report is based on this.

The Distance Learning Project, though not a process benchmarking project by true definition of the term, utilised many of the principles of process benchmarking.

Process benchmarking is not easy to summarise and, in addition, benchmarking is sometimes confused with benchmarks – ie performance measures, or with surveys. It is probably easier to explain benchmarking in terms of what it is not.

It is not **just** about comparing standards.

It is not **just** about taking part in a survey.

It is not **just** about league tables of performance.

It is not **just** about re-engineering your processes.

Benchmarking is a systematic method of improvement that utilises others' good practice and learning to improve your own processes. It can be used as a way of improving any process from ordering paperclips to recruiting staff.

Benchmarking is a method of identifying what must be improved in an organisation, finding ways of making those improvements and then implementing the improvements.

It requires an organisation to fully understand its processes and its customers' and stakeholders' needs. From that point it is possible to identify gaps between needs and performance.

(Owen 1999)

We had also intended to carry out desk-based research into the ISR and other FEFC/LSC data on distance learning as a basis for comparison with our results, but we discovered that the LSC did not currently process data for distance learning provision separately as a standard procedure, although it could be done as a special exercise. As our investigation went on we experienced many colleges' difficulties in providing us with hard data on retention and achievement rates for their distance learning provision, and some inconsistencies in their data.

However, hard data clearly emerges as a significant issue for future policy and planning for distance learning. We later recommend to the LSC that in future data on open and distance learning is recorded separately from full- and part-time provision, and in a way that allows differentiation

between open and distance learning. This point is also linked to our recommendation that the LSC reconsider the definition of distance learning in the *Funding guidance*.

Findings of the project

Diversity ... and its consequences

Our study, although small, included a wide range of distance learning schemes. Rural colleges, urban colleges, large colleges, small colleges; a national corporate provider and a public service organisation (both providing job-related distance learning for their own employees); two different types of partnership between colleges and an external organisation; small distance learning operations and several that enrolled many thousands of learners were all included. The first and overriding impression that arises from considering all the data in even this small study is of the enormous diversity of distance learning provision that is on offer.

Some programmes in the study were employment related, including those provided by employers, by colleges for employers, or by colleges in partnership with employers. There were general education programmes such as GCSE and A-levels; IT courses including CLAIT and the ECDL; short sport or leisure-related courses; business-related programmes such as accounting and bookkeeping; a wide range of foreign languages; and so on. Most providers offered a limited range, some only a few specialist courses, but the brochure of one provider listed almost 600 different courses varying from animal management to brief language courses in Xhosa, Yiddish and Zulu!

It was useful to our investigation to find such diversity. Many of the concerns of the funding bodies in recent times over distance learning quality, especially over retention and achievement rates, have been particularly focused on a few subjects with high enrolments, such as the

IT, bookkeeping and security guarding referred to in the FEFC's report on ODL. These have often been concentrated largely on a few providers with very high enrolments. We felt that being able to consider such a diverse range of distance learning programmes from providers of all sizes in the study should help us to make balanced judgements.

The range of programmes we found showed in microcosm the huge potential of distance learning to offer learning opportunities tailored to meet the needs of individual learners, groups of learners and/or their sponsors. At the same time, the study also showed how difficult colleges find it to harmonise and integrate the management of such a diversity of individualised programmes into the main college planning, funding and management cycle.

The consequence often seems to be that distance learning is set up as a more or less separate or completely separate operation under the college umbrella. One college answered the question 'How does this distance learning scheme integrate into the college's systems?' by saying 'It doesn't'. Several colleges had more than one distance learning scheme separately administered and managed. One college had three quite separate and different distance learning schemes run in isolation from each other (and to some degree also at arm's length from the college's planning and quality assurance processes). That is not to say that quality was not assured, as one of the schemes had a Beacon Award. But it would suggest that the college could have problems in monitoring, reviewing and developing the schemes successfully in the longer term. It was often difficult to locate the 'process owner' of the distance learning operation in a college.

The more or less separate arrangements often seemed to lead to difficulties and we believe it would be hard to build a significant expansion

of distance learning onto some of the existing management and administrative arrangements we found. In answer to the question 'What performance indicators do you use?' the answer from almost all colleges as a minimum was enrolment, retention and achievement rates. However, the answers to the follow-up question 'How do you collect data for the Pls?' did not always give confidence about the robustness of the process or the data it would produce. Typical answers to the follow-up question were 'Information on enrolment, contact and completion is logged by the Programme Leader' or 'spot checks'.

In contrast, there were also college providers who had long-standing and successful distance learning operations integrated into their main college processes, showing that integration is possible. It is perhaps significant that these colleges could provide us with the data we asked for on distance learning.

It seemed from the evidence that to be successful in the long term distance learning programmes needed to be included integrally in the institution's strategic planning process and the systems that support this process.

Looking for patterns

The capacity of distance learning to offer an alternative mode of learning to those who cannot or who do not wish to follow attendance-based programmes clearly gives it a vital role to play in widening access and in meeting the needs of employers for flexible and accessible learning opportunities for their employees.

In answer to the question to learners 'What are your reasons for choosing supported distance learning for achieving your qualification?' 36% said it

was because they could choose their own time to study, 20% because of family commitments, and 19% because it was the only way to fit study into work. But the additional comments given by learners bring the percentages to life:

Because it was the first time I have studied in 20 years and at the time I couldn't see another way.

I only undertook the course to get an exam pass quickly (12 weeks).

I am a full-time university student and need a grade C in GCSE Mathematics to undertake a PGCE.

Disability makes college access difficult.

I work 12 hour shifts so distance learning is my only option.

Agoraphobic – wouldn't cope well at college.

Unable to continue daytime class owing to hospital admission and recuperation.

Disabled – can't attend regular classes.

Did not wish to travel to college.

Working on contracts in different countries Zambia, Dubai etc.

The unique capability of distance learning to meet the needs of learners such as these makes it an extremely important strand of provision in the

post-16 sector. But only high quality distance learning really meets learners' needs. To exploit the full potential that distance learning offers we need to know more about the processes that ensure quality in a distance learning service.

Our questionnaire to providers asked about their processes under seven headings: planning, financial resources, staffing resources, learning materials, equipment and premises, delivery and support systems, and customer satisfaction. We were interested in the whole process of delivering distance learning from the stage of identifying the market, to the design, delivery and costing of the provision, to the exit of successful students from their programmes.

We were searching in all our evidence from these organisations for patterns: patterns in their processes for setting up and managing distance learning that seemed to suggest a correlation between their processes and the outcomes, either to ensure quality for the organisation and the learner or not. We believe that we did find evidence to support some conclusions on this.

Planning, monitoring and management

It would not surprise those involved in providing high quality distance learning to be told that overall our research strongly suggests that there is a correlation between good quality planning, resourcing and supporting of distance learning programmes and the successful outcomes that the learners and the organisation itself achieve.

...overall our research strongly suggests that there is a correlation between good quality planning, resourcing and supporting of distance learning programmes and the successful outcomes that the learners and the organisation itself achieve.

Indeed, from our evidence, good practice for distance learning probably has much in common with good practice for any course delivered through other modes of attendance. For example, the providers who achieved both high retention and achievement rates for distance learning were those who had identified their target market clearly, had planned the course to meet the requirements of their target learners, had a clear specification of the requirements for successful study on their programmes, had effective support from a range of staff, and had good costing information, efficient monitoring and review procedures, and so on.

...from our evidence, good practice for distance learning probably has much in common with good practice for any course delivered through other modes of attendance.

We also found some poor practice in the study, and much lower retention and achievement rates associated with it, which seemed to support the evidence of a correlation between processes and outcomes. One distance learning operation in this category was typical in not having identified a target market carefully. One answer to the question 'How do you identify the target population?' was:

We don't target any group of learners – we just advertise it in the prospectus.

Another replied:

There is a general understanding that distance learning is more suitable for adult learners and will play a part in achieving the college's strategic objectives for widening participation.

Contrast this with another college with high retention and achievement in distance learning provision that answered:

Market analysis based on past experience and historical trends + primary data collected by the sales and marketing team. We then target market sector by sector.

Integration of processes

One common pattern we found was that those providers who achieved high quality outcomes regarded planning, monitoring, managing and resourcing as related not separate processes, and they operated them in an integrated way. They understood their own processes, had them well documented and could offer documentary evidence of their operation. This would appear to be a critical success factor for the provision of a high quality distance learning service to learners. Our evidence suggests that distance learning that does not have an integrated set of processes for its design, delivery and management cannot form a platform for significant expansion.

...providers who achieved high quality outcomes regarded planning, monitoring, managing and resourcing as related not separate processes, and they operated them in an integrated way.

Some less successful providers had well developed processes to ensure quality in some areas, or had part but not the whole of a process that seemed to work well. They did not seem to regard each process as part of an integrated whole and often could offer only very limited documentary evidence of their processes. A frequent example related to the selection and use of learning materials. Most providers had, or said they had, systems in place to select learning materials initially against quality criteria, but only a minority had follow-up systems to ask for, record and, very importantly, to use learner or tutor feedback on the materials. By contrast, providers with the most successful outcomes did have such feedback loops in place. Similar examples of only partial achievement of quality through not 'closing the loop' could be found in many of the processes of less successful providers.

Finance

One possible result of distance learning operations sitting at arm's length from the main college systems for planning, costing and management is that many college providers did not have a clear idea of the costs of their distance learning operation. This endorsed the FEFC ODL report view that 'Colleges rarely have accurate information on the costs of distance learning' and '...it is impossible for most colleges to engage in any meaningful cost-benefit analysis'. We found that where distance learning is a separate operation it is often managed by a middle manager. Some seemed to believe that someone somewhere else might know the costs

but they did not (and sometimes were not keen to enquire too closely into them for fear of what might be revealed in a cost-conscious climate).

...only those who planned well knew what distance learning cost them.

The problem did not appear to us to be so much with funding as with planning – only those who planned well knew what distance learning cost them. One provider with high retention and achievement rates that also knew its costs said:

We spend a lot of time planning and monitoring.

In some cases a college had a commitment to distance learning as part of its widening participation efforts and the costs were reportedly not a major concern. It would still seem to us to have been useful to establish them in order to manage, and improve and develop the provision cost effectively in the longer term, regardless of the separate decisions that the college may make about pricing.

If providers of publicly funded distance learning are to move to a guaranteed level of customer service enshrined in a customer charter, as we would recommend and which BAOL already requires for the award of its Quality Mark, it would be difficult to draw up such a specification if the costs of providing the service are not known. This vagueness about costs contrasts with the answer from one provider that provides excellent support for learners who said:

We know everything about our costs.

and with another where all aspects of each distance learning course it offers are costed separately according to the precise method of delivery. These costs are recorded in a spreadsheet and monitored monthly, and the costing model is reviewed annually. Perhaps predictably, the commercial organisation included in the study had very stringent procedures in place for the initial costing, the routine monitoring of costs, and the longer term financial planning for its distance learning operation.

Pricing

The point on which there was probably the greatest divergence in the whole survey was on the prices paid by the learners for their course. Most learning materials used were produced by commercial providers who presumably charge what they believe the market will bear, in order to recoup what are often the considerable costs of developing and updating distance learning materials. It was still very surprising to find that within the college sector all the following charges were quoted by learners as the cost to them of a single GCSE subject by distance learning: no charge, £5, £25, £33, £90, £100, £120, £170, £200 and £265.

Even allowing for the fact that some of these rates would be concessionary, that the amount of support provided might differ, or that learning materials might be included or charged for separately, this is nevertheless potentially a very confusing variation for the learner. The higher charges also disadvantage learners who may need to learn by distance learning but could not afford the high prices charged by some colleges.

The great variation may be in part caused by colleges' lack of information on the costs of their distance learning provision. It should be considered whether this is a consequence or a cause of the provision so often not

being integrated into standard college processes for setting up and managing provision. Some recommended methods by the LSC for building up of the costs of a distance learning course for publicly funded providers would seem to be timely. For example, one college reported having to include a standard charge for college overheads in the costing for distance learning courses. This was a charge intended to reflect the use of accommodation, and central services such as libraries and computers, yet our research showed that over 90% of distance learners used such facilities 'occasionally or never'.

Support for the learner

From our study it would seem that tutor and other contact with the learner is a critical success factor in distance learning. All providers offered some tutor contact but that in itself is not sufficient. More subtle characteristics about the contact seemed to emerge as crucial. These included:

- speed of the initial contact
- the close monitoring of students' progress by the organisation via the tutor or administrator
- speedy and effective follow-up using a range of strategies if the learner's progress appears to be slackening
- intervention if all appears not to be well.

One provider with high retention and achievement rates summed up its approach to support as being a surrogate parent. More than one provider with high retention rates said it constantly monitors learners' progress and one said:

...if time is running out on an important assignment we chase it up.

***All providers with high retention rates
had well developed and well managed
processes for providing contact and
support.***

All providers with high retention rates had well developed and well managed processes for providing contact and support.

From the learner survey we learnt that overall 57% of learners had received information about a named tutor contact in a week or less from enrolment, leaving 43% who did not. Interestingly, 69% of the learners who replied from one provider had heard in a week or less, compared with only 36% and 32% of learners from two providers with much lower retention rates. It seems that prompt initial contact with the learner within a specified time should form one of the process benchmarks for distance learning.

When asked how effective the tutor support had been 71% of all learners replied that it had been 'effective' or 'very effective'. The figure for one provider with high retention rates was 86%. When asked what had been particularly effective the replies from learners from a range of colleges noted:

He replies very quickly.

Tutor very friendly and enthusiastic.

...kept in regular contact enquiring about my progress and giving me the option to contact the college if needed.

When I phone the college distance learning coordinators they are very friendly and very helpful.

I can phone my tutor at home. She is extremely conscientious and is in regular contact by letter and phone.

Contact with my tutor. He is an excellent communicator...

Encouraging comments from my tutor.

Although there were many fewer negative than positive comments about the tutor support, these included:

My tutor would only contact me if I sent her an assignment. She never asked how I was doing.

I found the meetings with my tutor were just a means of arranging to sit the assessments in a controlled environment.

The tutor has not been helpful. I have had to rely on friends for help.

There is little doubt from learners' replies that effective tutor support is regarded as crucial to their success.

Two providers had in the recent past successfully addressed low retention rates by improving their learner support arrangements. One said:

Retention has increased by over 20% on certain courses since we offered additional tutor support and workshops, additional prompts

and timetable help, extended hours of opening and website help etc.

This good practice contrasts with other providers in the study who, although providing some tutor support, apparently had no procedures in place for telephone or face to face induction. Some had very complex and attenuated procedures, or had no apparent procedures at all, for following up learners who missed a tutorial or assignment. Other providers had unreliable processes for supplementing tutor contact through helplines or contact with administrative staff.

The difficulties in ensuring effective learner/organisation contact in distance learning are clear, but our study found plenty of evidence of successful and imaginative good practice. One college programme that delivered the majority of a course online, communicated with learners via the web, had a PowerPoint presentation about the course accessible to them via the web as part of their induction, and had a wide range of client support strategies including e-mail, telephone and some face to face support. It was a relatively new course, but retention and achievement were both 100% to date.

Interestingly, the tutor contact with distance learners as a whole was not particularly 'high tech': 68% of learners said that telephone was the 'most frequent' or 'next most frequent' way of contacting their tutor, 59% said letter, and only 13% said e-mail. Replies from different providers reflected the design of their provision and the support arrangements built into it. One provider built in some face to face support, which was the first or second most frequent means of contact for 67% of its learners.

The importance of tutor or other staff contact to the learner is clearly magnified by the fact that only 10% of learners in the learner survey are in

touch with other learners, and of that small number the vast majority were in telephone contact only. Nor do they have much physical contact with the college itself as our question on their use of college facilities showed. The tutor *is* the college/provider for the majority of distance learners.

The tutor is the college/provider for the majority of distance learners.

Providers who maintained a high retention rate for distance learning students had well developed systems not only for supporting learners but also for identifying individual learning needs, including any needs learners had for extra support. This included providers who worked extensively with employers. One said:

The tutor might identify literacy/dyslexia needs – they would refer to the in-company contact and together work out a solution.

Initial information and guidance

It was surprising to find that only 48% of all learners said they had received their initial course information in a week or less. This went up to 75% in one provider with high retention rates. The remaining 25% of this provider's learners received it within 2 weeks. Among all learners, 28% waited between 1 and 2 weeks and a further 24% waited more than 2 weeks. When one of the potential benefits of a roll-on roll-off distance learning course is the ability to enrol at the point of highest motivation, having to wait 2 weeks or more for initial information about the course cannot be helpful. We need to consider whether more potential learners decided not to proceed after such a wait. Prompt response to enquiries for information (eg in 2 working days) should be considered an important standard for distance learning.

Prompt response to enquiries for information (eg in 2 working days) should be considered an important standard for distance learning.

Several providers with high retention rates invested considerable resources in the early stages of advice, guidance, enrolment and induction, believing that this paid for itself by contributing significantly to high retention. In response to the question 'Did you receive guidance on the most appropriate course to take?' only 46% of all learners answered 'Yes', a serious omission given the funding body requirements on initial guidance, quite apart from the need to ensure that distance learners, in particular, are making the right choice. Significantly, 86% of learners who were enrolled with a provider with a high retention rate said they had received guidance. Of all learners who received guidance, 91% said that it had been helpful or very helpful, leaving little doubt over the desirability of this procedure as far as learners are concerned. Evidence of the need for standards on this issue would seem clear.

Several providers with high retention rates invested considerable resources in the early stages of advice, guidance, enrolment and induction, believing that this paid for itself by contributing significantly to high retention.

Interestingly, given the much-quoted potential that distance learning offers to individual learners to 'learn at their own pace', we found that several providers with high retention rates specified quite clearly a period for completion of the course, and worked hard through monitoring the learners' progress and contact with them, to ensure that they did complete

and achieve in that time. The overall picture emerging from the learner questionnaire showed that only 8% of learners had been advised that their course would take between 1 and 6 months, compared with 38% who had been told it would take a year and 54% over a year to complete.

This gives food for thought in relation to the possible minimum specification for aspects of a distance learning course, and to the development of performance indicators around such a specification. We believe that completion within a specified period should form part of this specification, allowing organisations to set targets for completion/achievement and to work to improve them. This would build on the recommendations currently given in the *Funding guidance* (para. 194) that:

...distance learning students should be encouraged and supported to achieve the qualification or course in as short a time as possible to minimise the possibility of drop-out or non-completion. However, in some circumstances, it is accepted that the programme may take longer to achieve than if delivered by conventional means.

...completion within a specified period should form part of this specification, allowing organisations to set targets for completion/achievement and to work to improve them.

Recruitment of staff

Support for distance learners is typically shared between specialist tutors and administrative staff. The important role of administrative staff, who are often the first point of contact for distance learners, has long been

recognised and it was therefore surprising to us that most college providers interpreted the questions on staffing as applying solely to tutors. The multiple tasks of administrative staff in a distance learning operation need to be accurately specified and accurately costed. It would add considerably to the costs of distance learning programmes if tutors are carrying out tasks which can quite satisfactorily be done by administrative support staff. There is no recent template for the role of administrative staff in distance learning and we recommend that it would be helpful to review this now.

All providers recognised the importance of the tutor to their operation but there seemed to be marked differences in the apparent rigour of the selection and management procedures between providers with good retention rates and the others. Contrast these responses:

No analysis has been undertaken of the skills and competencies required for distance learning tutors employed by the college ... there is a recognition that this needs to be done.

Tutors must have 'a feeling' for distance learning ... this is assessed on interview.

with

Distance learning staff are employed on the same basis as other staff – application, references, interview.

[Tutors must be] specialists in the area of delivery. Tutors are trained for teaching online by doing the course themselves. In this way they learn how the system works and the student's view. This also provides high quality feedback on teaching and materials.

Another quality provider said:

We send out a tutor information pack. Applicants are interviewed and if successful move on to induction. They are mentored by the coordinator and have regular reviews and monitoring of their tutoring ... We require a minimum of a qualification for teaching and degree level in their own subject. We start new tutors with a small caseload and see how they work with this methodology.

Of the learners surveyed from this last provider, 85% said that distance learning was 'effective' or 'very effective', and 79% said they would 'probably' or 'definitely' choose to study by distance learning again. Compare this with figures of 68% and 71%, respectively, for learners as a whole. However, the differences in the numbers who were continuing to another course of study (not necessarily distance learning) were not so great between providers with the most successful outcomes and others (ie 86% for the learners of one such provider and 85% for all learners). It suggests that the experience of learning, even if less satisfactory than they had hoped, had nevertheless inspired learners to carry on.

...attention to the recruitment, management and support of both tutors and administrative staff must in our view form part of the good practice processes for distance learning.

Given our finding that the provision of support is crucial to the success of distance learners, attention to the recruitment, management and support of both tutors and administrative staff must in our view form part of the good practice processes for distance learning. The well known hazard for coordinators of distance learning in colleges of having to accept staff with

shortfall on their timetables, whether or not they have the appropriate skills to act as distance learning tutors, is likely to militate against success in any distance learning operation.

Learning materials

Both successful and less successful providers had procedures in place for the selection of materials, usually involving the assessment of commercially produced materials by subject specialist tutors and/or the distance learning manager/coordinator. One provider was a long-standing producer of distance learning materials itself; another had produced materials in-house as part of a development project as nothing suitable could be found. A wide range of materials was in use in the providers with the most successful outcomes.

A distinguishing feature of these providers was that they all had procedures not only for selecting but also for monitoring the use of materials, getting feedback from learners and in some cases tutors as well, and for using that feedback as part of their management and review process. One provider asked all tutors to work through the distance learning course they were to tutor on.

...[the more successful providers] had procedures not only for selecting but also for monitoring the use of materials, getting feedback from learners and in some cases tutors as well, and for using that feedback as part of their management and review process.

We were surprised not to find more emphasis by providers on the importance of the learning materials in their answers, but perhaps to

established providers of distance learning their importance was self-evident.

Of all learners, 33% said that the learning materials used were 'not at all effective' or only 'reasonably effective'. Although only 28% of learners had been shown examples of the course material that they were going to use, 76% of those who had been shown it said that it was 'helpful' or 'very helpful' in making their decision to take the course. Compare this with one provider, 54% of whose learners had the opportunity to see the learning materials in advance – 86% of its learners said the learning materials used were 'effective' or 'very effective'. An opportunity for learners to see and assess for themselves a sample of the learning materials to be used would appear to be an important example of good practice for distance learning.

An opportunity for learners to see and assess for themselves a sample of the learning materials to be used would appear to be an important example of good practice for distance learning.

An interesting point made by one provider was that the onerous task of ensuring that large stocks of learning and support materials are regularly reviewed and kept up to date is a task needing librarian skills, which are often not available to a distance learning operation. It is worth noting that some suppliers of learning materials offer subscription schemes with services which do provide information, advice and regular updates of materials and curriculum information, and this can help to minimise the problem.

Another observation from one college was that in some poor quality distance learning materials there is a mismatch between the level of the qualification at which they are aimed and the level of language use and

study skills that they demand for their use. This can lead to low retention for that programme. This only serves to emphasise the central importance of high quality distance learning materials to ensure maximum levels of retention and achievement. Such high quality materials would now include guidance to learners over study methods, in order to meet a college's statutory health and safety obligations.

Premises and equipment

The questions on premises and equipment elicited a range of answers from providers, with few patterns emerging. It would seem to us from the answers received that for a distance learning provider premises are, as might be expected, not usually a major issue. Some distance learning courses still involve face to face contact for tutorials, and appropriate accommodation is needed and was mentioned by providers who offered this service. One rural college allowed tutorials to take place in a learner's or tutor's house.

Information from the learner survey would bear out the low importance generally accorded to the premises by providers. In answer to the question about use of the college facilities, the computers were the most used facility, but even here only 7% of the learners used them weekly, and 93% 'never' or 'occasionally'. A similar picture emerged with library (99% occasionally or never), e-mail (94% occasionally or never) and the other facilities listed in the question. This is despite the fact that only 34% of learners said that access to the facilities was 'difficult' or 'very difficult'. Of the learners who answered 'difficult' or 'very difficult', 95% of them said that it was difficult or very difficult because of distance (perhaps unsurprising for a distance learning course).

Equipment, usually interpreted by providers as ICT equipment, was seen as necessary to their operation by all providers, though some were planning to make, or were already making, more use than others of the potential for web-based communication. Again there were no clear patterns evident to distinguish successful from less successful providers.

Customer satisfaction, including the learner survey

Providers were asked about the systems they had in place to obtain regularly the views of clients, learners and sponsors, whether or not they had a complaints policy, and how they used customer feedback to review and develop their service.

All providers had some procedure in place to obtain customer feedback, but once again the differences between providers with high retention rates and others was apparent. One provider with little statistical information available on retention and achievement said:

After 1 month students are sent a feedback form. There are no further on-course questionnaires.

Most college providers seemed to use the college systems for surveying all students' satisfaction via 'student perception of courses' questionnaires, or 'quality' questionnaires. All said they had a customer charter; some used the college charter only and others had a separate one for their distance learning operation. All had a complaints policy/procedure, often set out in a student or customer handbook. However, one provider made the point that a college charter often focuses attention on access to college facilities and services not relevant to distance learners. This suggests that a charter specific to distance learners should be recommended.

What distinguished the providers with the most successful outcomes from the others was the use they made of the survey results, feedback from learners or the record of complaints.

What distinguished the providers with the most successful outcomes from the others was the use they made of the survey results, feedback from learners or the record of complaints. For example, they had a clear line of responsibility that they quoted for dealing with a complaint. One said:

Course Specialist, then Line Manager, then Head of Unit – and all complaints notified to HOU. Customer feedback is raised in all internal meetings.

Another provider of quality services said:

We have a complaints procedure with an agreed turn round time and each complaint logged. We incorporate customer feedback through an analysis of student surveys and of complaints into Programme Reviews. It triggers an action planning process that resolves complaints, but we try to resolve issues before they become complaints.

It was probably no coincidence that we found that all providers with high retention rates also had one or more customer care awards. Interestingly, from the learner survey we found that only 67% of learners overall said they had been given an opportunity to comment on the efficiency and effectiveness of the course programme, although that rose to 91% for one of the providers with high retention rates. Despite the attention paid to getting learners' views by all providers, only 20% of those who had been

surveyed said that they in turn had received feedback on the comments that they had made.

It would seem that there is evidence of the need for each learning provider to produce a defined process. This should not just solicit customer opinion but should be seen as a vital source of information for the development of a quality service and for use in the management process.

Retention and achievement

The allegation of poor retention and achievement rates has long been made by the critics of distance learning. There is plenty of evidence to support this allegation, including that offered in the FEFC report on ODL. That report stated:

Achievement rates are very low. Retention rates are low, though hard to measure accurately because colleges are not always certain whether students are still active learners or have withdrawn from their courses.

However, we believe that our study supports the view, offered many times in defence of distance learning, that high quality programmes have retention and achievement rates that compare very favourably with retention and achievement rates on full- or part-time versions of the same programme. Among colleges in the study that had high quality processes, in most or all areas retention rates were high. For example, one provider with robust data and several quality awards had retention of over 90% for the past 3 years, and retention to date was 100% on individual courses at two other colleges. Achievement rates in one college were over 80% for the past 3 years. These rates compare very favourably with the rate of

84.1% for adults on part-time programmes in general FE colleges in 1999/2000 (LSC 2001).

...high quality programmes have retention and achievement rates that compare very favourably with retention and achievement rates on full- or part-time versions of the same programme.

Interestingly, high retention was not always accompanied by high achievement rates. In some cases there was an apparent anomaly between high retention rates and much lower achievement rates (eg retention of 86% and achievement of 36%). We believe this pattern merits further investigation. Are learners continuing to stay on the programmes because they are getting the outcomes they want from them, even though these may not be formal qualifications? Do they complete the course but not enter for the qualification? Are they attempting the qualifications and failing? Are the statistics telling the whole story about learners who may take longer to achieve their qualifications than learners via other modes? We believe some further investigation of patterns where retention is high and achievement much lower is urgent if rational planning decisions are to be made about distance learning in the future.

We believe some further investigation of patterns where retention is high and achievement much lower is urgent if rational planning decisions are to be made about distance learning in the future.

Several possible contributory factors were mentioned to us. For example, an employer paying for an employee on a distance learning course may

not be interested whether or not the employee gets a qualification. Also, some learners may want to complete only some units or modules of a programme, which currently would not contribute to achievement data although the learner has achieved the outcome they wanted.

Sometimes high retention rates for distance learning are queried – are colleges tracking learners effectively and so is the data on who is or is not still on the programmes reliable? Our experience of asking for retention and achievement data and finding that not all colleges could provide it routinely suggests that in some cases this could be a valid question to ask about an apparently high retention rate. But we also found the anomaly between high retention and much lower achievement rates for programmes where good data was available and very robust processes to assure quality were in place. Unreliable retention data is not in our view the whole story. Several colleges noted to us the difficulty of collecting data for distance learners who may start and complete their programme at any time of the year, when the main college management information system is set up for a different cycle. It is unfortunate, if unsurprising, that many distance learning coordinators try to keep their own data, which is then very difficult to validate against centrally held data.

A view expressed by several colleges is that retention rates for distance learning courses are lower for learners who do not pay fees and that the level of course is also influential: also that when a high proportion of learners' fees are being paid for by their employers retention is high. These views merit further investigation.

Perhaps the consequences of poor practice are particularly exposed in distance learning programmes because there are few other social factors to hold learners and compensate for lack of quality in course design or delivery. For example, peer contact and contact with an institution may

hold students on an attendance-based programme even when they are not very satisfied with it overall. We would suggest that the lack of these cohesive factors should perhaps explain to funding bodies retention and achievement rates for distance learning which do not necessarily match those of attendance-based programmes. This does not suggest that rates significantly lower than attendance-based programmes are acceptable.

Conclusions and recommendations

Issues around definitions

One strength of the distance learning method is the enormous potential it gives to providers to vary the design of the programmes to meet the needs of learners or their sponsors. Varying amounts of tutorial time and home- or work-based study can be combined, if required, with some attendance for group tutorials, occasional classes or even residential study. The length of the programmes can be fixed or variable. The advent of new technologies in recent years, culminating in online learning and the potential offered by the web, has increased the possibilities for individualising programmes in truly mind-blowing ways.

If the programme is being costed accurately at full economic rates and paid for by the client, be they individual or corporate, then the exact design of the programme does not cause a problem. No one is worried about deciding whether it is or is not defined as 'distance learning'. The law of the market will to a large extent decide whether the quality and value for money satisfies the customer.

However, if distance learning is in whole or part publicly funded the funding bodies need to ensure that the programmes offer quality and value for money. They have a legitimate interest in the specification and delivery of the programme.

The apparent difficulties that many colleges have in integrating a range of different distance learning programmes into their standard college management processes is a reflection in part of a tension that has developed. This tension is between the providers' wish to exploit the

potential of the distance learning method to meet learners' needs for flexibility in their learning opportunities, and the funding bodies' need to ensure quality and value for money in publicly funded distance learning. This tension has given rise in recent times to ever more elaborate definitions of distance learning in the *Funding guidance*. Our survey would suggest that the definitions and associated regulations are now in danger of becoming counter-productive, in discouraging providers of good quality distance learning as well as excluding poor distance learning provision.

An established provider of large-scale distance learning that would meet all quality criteria noted:

The funding tariff is extremely problematic. It is not clear what funding will accrue from different provision and there are no definitive answers from the funding bodies (FEFC or LSC). There is a great deal of ambiguity – definitions seem to shift and different auditors have varying opinions on what is acceptable. This hampers business activity and planning. In fact, this year we have drawn back from distance learning as it is so complicated to work out the funding and we are not confident that provision will draw down the funding anticipated. We will be more likely to offer a mixed mode of learning, though the difference between this and distance learning is largely a matter of interpretation. We wish to emphasise the urgent need for clarity in terms of definitions and funding guidelines for distance learning.

This tension is undoubtedly exacerbated by many colleges' inability to identify accurately the costs of their distance learning provision. The provider who made the above comments had very accurate information on costs. However, for many colleges the combined effect of a complex LSC definition, almost infinite variations of distance learning course design, and

their own difficulty in identifying and tracking costs will act as a powerful deterrent to the expansion of distance learning, because of the potential risks it seems to pose to the college. No wonder the 'solution' has often been to leave distance learning as minority provision at arm's length from the college systems.

We began to ask, perhaps surprisingly, whether the funding bodies' definitions are trying to be too all-embracing? It might be more manageable for both funding bodies and providers to have a clear framework for fundable distance learning programmes, perhaps drawing on the work of Mick Fletcher on the taxonomy of open and distance learning (Fletcher 2001). We hope that beginning to define good practice processes for distance learning through this study may help the LSC's consideration of this.

We believe that the LSC should consider as interlinked issues to be addressed together in relation to publicly funded distance learning:

- a minimum specification or series of specifications for the design of distance learning programmes (together with recommendations on targets)
- guidance on a costing method
- a review of data collection
- recommendations on good practice for distance learning.

Recommendations on good practice processes in distance learning operations could also perhaps be helpful to the Adult Learning Inspectorate.

The case for distance learning

Learning to succeed (DfEE 1999) sets the clear imperative 'The interests of the learner must come first'.

This has now been enshrined in the new Common Inspection Framework. The CIF makes it clear that systems and processes are of interest only to the degree that they help to ensure a high quality experience for the learner. Providers will be judged on their ability to plan and deliver a quality learning experience effectively and efficiently.

The requirements of the CIF, and the parallel requirements of the funding bodies, will apply to distance learning provision the same as to any other provision – there will be no special cases. These requirements include the expectation that realistic targets will be set for learner retention, achievement and completion; that providers will collect and produce robust data; that learner feedback will be obtained and used; that evidence-based self-assessment will take place; that the results will be used in an integrated way in the organisation's cycle of planning, management and review; and so on.

The results of our study have shown that it is possible for colleges to meet these requirements for their distance learning operation but that at present not all do so. In defence of colleges, it must be said that currently there are significant challenges to be overcome before they can do so. In our view, many arise from the tension between the almost limitless permutations that distance learning offers to providers for course design, start and completion dates etc, which have to be set against necessarily prescribed systems of the funding bodies for all publicly funded provision, which must then be enshrined in definitions and regulations that apply to distance learning.

It is no wonder that many colleges put what they see as the complications and even potential risks of running distance learning at arm's length from their main systems. This can create the self-fulfilling prophecy:

Distance learning is seen as difficult to run → →

→ → it is put outside the standard college systems with often inadequate alternative systems and support in place → →

→ → the operation may run satisfactorily on a small scale but runs into difficulty over monitoring and management if it tries to expand because the infrastructure is not there → →

→ → it either stays small and fairly marginalised or may become the huge 'black hole' that no one can produce robust data for → →

→ → it is highly likely then to be seen as risky and may well be discontinued.

We have found that distance learning can be run cost effectively within college systems with high retention and achievement rates and high levels of customer satisfaction. This requires customers' needs to be seen as central, and key processes which we have identified to be in place and managed in an integrated way. Our specific recommendations follow. We hope that these will form a significant practical contribution to the future planning of distance learning so that it may reach its true potential in the new post-16 sector.

Recommendations

Recommendations to the LSC

The first set of recommendations is for the LSC. We recommend that it consider supporting colleges by:

- setting a minimum specification or small series of specifications for funded distance learning provision, rather than having a single wide-ranging definition which is open to different interpretations, as at present
- issuing some guidance to sector providers on a costing method for distance learning
- recommending some parameters for charging policies for distance learning, in particular in relation to the inclusion of the cost of learning materials in the charge quoted to students
- revising the criteria for data collection on open and distance learning to establish a category of data for distance learning separate from part-time, and to allow differentiation between open and distance learning
- giving guidance to colleges on the tracking of distance learners and on the collection of tracking data for distance learning students
- recommending process benchmarks and associated performance indicators for distance learning based around those we suggest
- putting in hand work on the collection of statistical information on distance learning to allow the establishment of metric benchmarks for distance learning at an early date
- investigating further the apparent anomaly between high retention and lower achievement rates in distance learning
- considering issuing good practice guidelines for the operation of distance learning in the post-16 sector.

Recommendations to providers

The second set of recommendations is to providers and relates to their management of distance learning provision. Our study suggests that they need to:

- have clear procedures for establishing and reviewing regularly the costs of all aspects of their distance learning courses, whatever decisions may be made later about pricing
- offer effective initial guidance to **all** distance learners
- specify realistic times for the completion of a distance learning course and put in place systems to support learners in their achievement of them wherever possible
- set up robust procedures for tracking and monitoring learner/tutor contact with recognised criteria and procedures for intervention where necessary
- establish recognised and rigorous procedures for recruiting and managing tutors and administrative staff and specifying the skills and competences for those staff involved in supporting distance learning
- set up systems to obtain and use feedback from distance learners on their experience of their course, including their tutor support, and their views on the learning materials used
- set targets for aspects of customer service, such as responding to an enquiry, referral to a tutor etc, and monitor achievement of them
- use the quantitative and qualitative data from their monitoring processes routinely to improve service levels
- integrate distance learning provision into the standard college processes for planning, costing, management, monitoring, review and evaluation.

Learner needs

The third set of recommendations, again for providers, is based on the belief that the starting point for their distance learning provision should be the identified needs of their customers (learners and sponsors).

We recommend a customer charter with a guaranteed level of service including a commitment to:

- systematically investigate the needs for distance learning provision in their locality (given that many local learners cannot access class-based college provision)
- design distance learning provision to meet identified needs
- respond within given times to an initial request for information
- offer impartial and effective initial advice and guidance to all potential distance learners, including the consideration of modes other than distance learning courses
- give customers the opportunity to see a sample of learning materials that would be used for their course
- guarantee times for first contact with their tutor after enrolment and times for receipt of learning materials after enrolment
- specify the amount and nature of tutor contact
- specify the access to facilities
- make arrangements for learners with additional learning needs
- give advice on progression routes following their distance learning course
- provide information about the complaints procedure with a guaranteed response time to complaints
- give customers the opportunity to give feedback on their distance learning course.

Appendix 1 Distance learning provider questionnaire and background summary

Planning the service

Areas identified as being contributory to success:

- target population is identified
- goals/aims/objectives are set for distance learning operation and individual programmes
- targets set are related to quality for key aspects of the service
- systems for collecting data to monitor and review key processes are in place (including customer feedback)
- planning for the service is integrated into corporate planning of the organisation.

Prompts and questions	Responses
How do you identify the target population?	
How do you identify customer needs?	
How do you set goals/aims/objectives for DL as a service?	
How do you set goals/aims/objectives for individual programmes?	
What performance indicators do you use?	

How do you collect data for the PIs?	
How do you use the data for planning and reviewing the service?	
How does the DL planning and review cycle tie in with the organisation's planning and review cycle?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Documented goals/aims/objectives	
Corporate/departmental plans	

Resources – finance

Areas identified as being contributory to success:

- budget available and allocated
- distance learning programmes and overall operation costed
- financial targets set and monitored.

Prompts and questions	Responses
How do you identify the budget requirements for DL?	
Who is responsible for allocating the budget to DL?	
How did you identify the costs of delivering the programme?	
How do you review these costs?	
What financial targets are set?	
How are the targets monitored?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Minutes/report of reviews	
Reports on targets	

Resources – staffing

Areas identified as being contributory to success:

- clear definitions of roles/job descriptions/competences required
- staff with appropriate mix of skills (ie managerial, admin, tutoring, specialist technical) to staff distance learning operation
- staff development opportunities linked to individual and business requirements.

Prompts and questions	Responses
How do you identify the competences for DL staff and how do they differ from non-DL staff competences?	
How do you identify staff development requirements?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Job descriptions of DL and non-DL staff	
Staff development reports/requests	

Resources – learning materials

Areas identified as being contributory to success:

- system in place for identifying quality learning materials in all media to support programme(s) offered
- system in place for purchasing learning materials for stock or learner use.

Prompts and questions	Responses
How do you identify what learning materials are required?	
How do you obtain learning materials of a suitable standard?	
Who is responsible for purchasing/obtaining learning materials?	
How are current learning materials reviewed for suitability?	
How are learners consulted on learning materials?	
What use do you make of IT/interactive materials?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Minutes/reports on learning material reviews	
Examples of learning materials	
Feedback from learners	

Resources – equipment/premises

Areas identified as being contributory to success:

- premises and equipment needs identified
- premises meet statutory requirements
- premises/accommodation fit for purpose
- appropriate equipment available to meet requirements of learners
- appropriate technologies provided to meet learners' needs/requirements
- adequate technical support available for all equipment available.

Prompts and questions	Responses
How do you identify what premises are required?	
How do you manage/maintain premises?	
How do you identify what equipment/technology is required?	
How do you manage/maintain equipment/technology?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	

Delivery and support systems

Areas identified as being contributory to success:

- clear information available to learners/sponsors about services offered: level and types of programme offered; cost; availability; arrangements for tutor support: who, when, where; qualifications that may be achieved
- impartial advice and guidance provided to help potential learners/sponsors clarify their learning needs and the extent to which distance learning is appropriate for them and to choose a distance learning programme if this method is appropriate
- systems in place to identify any additional learning needs that learners may have
- systems in place to provide support for any additional learning needs identified
- systems in place to allow learners to demonstrate and record achievement/obtain qualifications
- systems in place to allocate tutor/mentor with appropriate skills
- systems in place to monitor and record learner progress and achievement
- systems in place to monitor and record performance/caseload of tutor/mentor
- systems in place to identify learners who become inactive against agreed criteria, to contact them and agree next steps (continuation/withdrawal).

Prompts and questions	Responses
What information do you give about the services and subjects that you offer?	
How do potential learners obtain information and advice on the suitability of the learning methods, subjects, timescale, level and qualification?	
How do you induct new learners?	
How do you identify additional learning needs?	
How do you provide for those additional learning needs?	
How do you identify learners' needs?	
How do you match learners' needs with the appropriate tutor/mentor skills?	
How do learners demonstrate and record achievement?	

How is this achievement monitored?	
How do you identify learners at risk of leaving/failing?	
How do you offer support and advice to learners at risk of leaving/failing?	
How are qualifications obtained?	
What strategies have you used to improve retention and achievement?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Retention achievement reports	
Definitions of achievement, retention etc	
Induction materials	
Information leaflets	
Retention and achievement records/reports	

Customer satisfaction

Areas identified as being contributory to success:

- systems in place to obtain regularly the views of clients, learners, sponsors
- complaints policy/customer charter in place and displayed to customers
- information from customer feedback used to review and develop services.

Prompts and questions	Responses
How do you obtain feedback from your customers?	
Do you have a customer charter?	
What is your complaints policy/procedure?	
Who is responsible for monitoring complaints?	
How do you inform your customers of how to give feedback/complain?	
How do you incorporate customer feedback into service review and development?	
Do you have any customer care awards?	

Documents to request	Available?
Flowcharts of processes	
Documented procedures	
Customer charter	
Complaints leaflets	

National report from the Inspectorate on Open and Distance Learning, FEFC, 2000-01

Criticisms of distance learning provision in the summary of the report

- distance learning often fails to meet individuals' needs
- induction processes are often unsatisfactory
- students' needs for additional learning support are often neither identified nor met
- key skills are not developed effectively, assessed nor accredited
- opportunities for personal support are few
- the use of IT to support students' learning is underdeveloped
- achievement rates are very low
- retention rates are low, though hard to measure accurately as colleges are not always certain whether students are still active or have withdrawn
- quality assurance arrangements have failed to produce improvements in retention and achievement
- inadequate use of target setting and performance indicators
- links between strategic planning and management of the curriculum are weak and curriculum management is poor
- colleges rarely have accurate information on costs of distance learning.

Criticisms of open learning provision in the summary of the report

- overall costs of setting up and running open learning centres both within the college and at community venues are rarely carefully analysed

- information provided to prospective students is not always of good standard
- some receive inadequate advice and guidance when selecting their programme of study
- quality of tutor support varies with IT students often receiving the most effective support
- students' needs for additional learning support not always met
- learning materials not always matched to students' abilities
- colleges slow to modify materials where common difficulties have been identified
- technology has not been used effectively to make learning materials more interactive.

DISTANCE LEARNING

- College name

learning
and skills
development
agency

This form will be electronically scanned. Please complete using black ink, marking the relevant boxes like this: ☒. If you make a mistake please complete the correct box and mark the incorrect box like this: ☒.

When providing written answers please only write within the space provided.

Q1 How old are you?

- ☐ 16-19 ☐ 20-24 ☐ 25-35 ☐ 36-45 ☐ 46-55 ☐ over 55

Q2 What sex are you?

- ☐ Male ☐ Female

Q3 Which of the following apply to you? (Please mark all that apply.)

- | | |
|---|---|
| ☐ Employed full-time | ☐ Employed part-time |
| ☐ Full-time carer | ☐ Part-time carer |
| ☐ Unemployed | ☐ Retired |

Q4 How did you discover that distance learning was a possible way to study?

- | | | |
|--|--|---|
| ☐ Independently (on my own) | ☐ Through friends | ☐ Through college |
| ☐ Through careers service | ☐ Job centre | ☐ Through employer |

Q5 How did you contact the college in the first instance?

- ☐ Telephone ☐ E-mail ☐ Internet ☐ Letter ☐ In person

Q6 What are your reasons for choosing supported distance learning for achieving your qualification? (Please mark all that apply.)

- | | |
|---|--|
| ☐ Choose own time to study so more convenient for me | ☐ No course available locally |
| ☐ Only way to fit study into work pattern | ☐ Family commitments |
| ☐ Only way to study this particular topic | ☐ Other (please state below) |
| ☐ Used this method of study in the past | |

Q7 Were any of the following alternative ways to study discussed with you? (Please mark all that apply.)

- | | |
|--|---|
| ☐ Full-time course | ☐ Part-time during the day |
| ☐ One day per week | ☐ Evening course |
| ☐ Combination of part-time day and evening | |
| ☐ Buy tutor time by the hour at a time that suits you | |



Q8 a) Did you receive guidance on the most appropriate course to study?

☐ Yes ☐ No (Go to Q9)

Q8 b) Was it by:

☐ Telephone ☐ E-mail ☐ Internet ☐ Letter ☐ In person

Q8 c) How helpful was the guidance?

☐ Unhelpful ☐ Not very helpful ☐ Helpful ☐ Very helpful

Q9 a) Were you shown examples of the course material you are going to use?

☐ Yes ☐ No (Go to Q10)

Q9 b) How helpful was this in making your decision to study?

☐ Unhelpful ☐ Not very helpful ☐ Helpful ☐ Very helpful

Q10 How long was it before you received course information?

☐ 3 days ☐ A week ☐ Two weeks ☐ Over two weeks

Q11 How long have you been told your course will take?

☐ 1 - 3 months ☐ 3 - 6 months ☐ Up to 1 year ☐ Over 1 year

Q12 What is the title of the course you are studying?

Q13 How long was it after acceptance on the course (study programme) that you received information about a named contact (tutor)?

☐ 3 days ☐ A week ☐ Two weeks ☐ Over two weeks

Q14 Which are the two methods you most frequently use to contact your tutor ?

(Please mark 1 for the most frequent, and 2 for the next most frequent)

☐ Telephone	☐ E-mail	☐ Internet
☐ Letter	☐ In person	☐ Video conferencing

Q15 If the tutor is not available when contacted, what alternative administrative support is offered to you? (Please mark all that apply.)

☐ Message taken
☐ Referred to another tutor
☐ Asked to call back
☐ Told tutor will 'phone back
☐ None of these

73



Q16 How frequently do you have contact with your tutor?

- ☐ Weekly
 ☐ Every two weeks
 ☐ Monthly
☐ Only when I have a problem
 ☐ When I have submitted an assignment/unit
☐ Other (please specify below)

Q17 a) Are you in touch with other students studying the same course (programme)?

- ☐ Yes
 ☐ No (Go to Q18)

Q17 b) How do you get in touch?

(Please mark 1 for the most frequent, 2 for the next most frequent, etc. for each method you use)

- | | | |
|------------------------------------|------------------------------------|---|
| ☐ Telephone | ☐ E-mail | ☐ Chatline |
| ☐ Letter | ☐ In person | ☐ Video conference |

Q18 How often do you use the following general college facilities?

	Weekly	Monthly	Occasionally	Never
Library (use printed material)	☐	☐	☐	☐
Computers for general use	☐	☐	☐	☐
E-mail	☐	☐	☐	☐
Internet (for searches)	☐	☐	☐	☐
Learning materials held electronically (including assignments, etc.)	☐	☐	☐	☐
Multimedia (using learning materials interactively)	☐	☐	☐	☐

Q19 How easy is access to the general college facilities?

- ☐ Very difficult
 ☐ Difficult
 ☐ Acceptable
 ☐ Easy
 ☐ Very easy

Q20 If you answered 'difficult' or 'very difficult' to Q19, was it because of:

- | | | |
|-----------------------------------|------------------------------|-----------------------------|
| It not being part of the contract | Yes ☐ | No ☐ |
| The distance from the college | Yes ☐ | No ☐ |
| The times of opening | Yes ☐ | No ☐ |

Q21 a) Are you given opportunities to comment on the efficiency and effectiveness of the course (programme)?

- ☐ Yes
 ☐ No (Go to Q22)

Q21 b) Have you received feedback on the comment?

- ☐ Yes
 ☐ No



Q22 a) How effective did you find the following?

The learning materials used to support the course
The tutor support
The college support (other than tutor support)

Not at all
effective

Reasonably
effective

Effective

Very
effective

☐
☐
☐☐
☐
☐☐
☐
☐☐
☐
☐

Q22 b) Please say what you found to be particularly effective:

Q22 c) or particularly ineffective:

Q23 Are course materials:

☐ Charged separately

☐ Included with the tuition fees

Q24 How is your course paid for?

☐ By you

☐ By your employer

☐ I'm exempt from paying

☐ Through an Individual Learner Account (ILA)

Q25 What is the cost of your course?

£

Q26 How effective a way of learning have you found distance learning?

☐ Not at all effective

☐ Reasonably effective

☐ Effective

☐ Very effective

Q27 If you were to take another course of study, would you choose to study by distance learning again?

☐ Definitely not

☐ Possibly

☐ Probably

☐ Definitely

Q28 Are you intending to continue with any course (not necessarily by distance learning) after completing this course?

☐ Yes

☐ No

Q29 Have you received information on progression to other courses, either at the college or elsewhere?

☐ Yes

☐ No

**Thank you for taking the time to complete this questionnaire. Please return it to :
Jane Owen, LSDA, FREEPOST (BS6745), London, SE11 5BR
by: Friday 31st August 2001**



References, further reading and useful websites

References

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Further reading

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NEC. *Flexistudy manual*. National Extension College, 1996.

Race P. *The open learning handbook*, 2nd edition. Kogan Page, 1997.

Useful websites

Learning and Skills Council – www.LSC.gov.uk

Learning and Skills Development Agency – www.LSDA.org.uk

National Extension College – www.nec.ac.uk

Raising Quality and Achievement Programme – www.RQA.org.uk



The Learning and Skills Development Agency (LSDA) is a strategic resource for the development of policy and practice in post-16 education and training.

The National Extension College (NEC) is a not-for-profit educational trust dedicated to widening educational opportunities for adults through distance learning.



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